

**ENERGY MANAGEMENT SERVICES**  
**Bid Process for a Request for Qualifications/Proposal**

**Steps:**

1. Create an RFP under M.G.L. c. 25A, § 11C or an RFQ under M.G.L. c. 25A, § 11I. The RFP and the RFQ must contain:
  - a) The name and address of the public agency.
  - b) The name, address, title, and phone number of a contact person.
  - c) The date, time, and place where responses must be received.
  - d) A description of the services.
  - e) A facility profile with a description of each building.
  - f) The evaluation criteria for assessing the responses.
  - g) A statement that the public agency may cancel the RFP/RFQ when the public agency determines that cancellation or rejection serves the best interests of the public.
  - h) Any other stipulations and clarifications the public agency may require, which shall be clearly identified in the RFP/RFQ.
  - i) Accurate energy consumption data for the most recent 3 year period for an RFP, and the most recent 2 year period for an RFQ.
2. Send copy of the RFP or RFQ to DOER **one week** prior to publication
3. Issue RFP or RFQ; publish in the Central Register
4. Hold a site visit for interested DCAM certified companies
5. Review written responses and select top candidates
6. Interview top candidates
7. Select a respondent; notify DOER
8. Contract to implement projects through an Energy Management Services Agreement (EMSA and PPA if Solar)
9. File EMSA with DOER
10. File annual measurement and verification report with DOER

---

**Section 11I: Minimum requirements for evaluating an RFQ include:**

1. references of other energy savings contracts performed by the qualified providers;
2. the certificate of eligibility and update statement provided by the qualified providers;
3. quality of the products proposed;
4. methodology of determining energy savings;
5. general reputation and performance capabilities of the qualified providers;
6. substantial conformity with the specifications and other conditions set forth in the request for qualifications;
7. time specified in the qualifications for the performance of the contract; and any other factors the public agency considers reasonable and appropriate, which factors shall be made a matter of record.

---

**Section 11C: Minimum requirements for evaluating an RFP include:**

1. DOER Certificate of Compliance
2. total project price
3. estimated savings/production
4. price data
5. statement of objectives on which responses will be evaluated
6. references of other energy savings contracts performed by the qualified providers;
7. the certificate of eligibility and update statement provided by the qualified providers;
8. methodology of determining energy savings;
9. general reputation and performance capabilities of the qualified providers;
10. substantial conformity with the specifications and other conditions set forth in the request for proposal;
11. time specified in the proposal for the performance of the contract; and any other factors the public agency considers reasonable and appropriate, which factors shall be made a matter of record.